

REQUEST FOR PROPOSALS (RFP) NO. 05-012

TO

FURNISH SERVICES TO

ASSIST THE UNIVERSITY OF HAWAI'I

IN OBTAINING FEDERAL FUNDS

UNIVERSITY OF HAWAI'I

HONOLULU, HAWAI'I

AUGUST, 2004

BOARD OF REGENTS

UNIVERSITY OF HAWAI'I

HONOLULU, HAWAI'I

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NOTICE TO OFFERORS

(Section 304-4, HRS)

PROPOSAL FORMS for Request for Proposal (RFP) No. 05-012 to Furnish Services to Assist the University of Hawai'i in Obtaining Federal Funds, will be available from and received in the OFFICE OF PROCUREMENT AND REAL PROPERTY MANAGEMENT (OPRPM), UNIVERSITY OF HAWAI'I, 1400 LOWER CAMPUS ROAD, ROOM 15, HONOLULU, HAWAI'I 96822, (an unofficial copy of the RFP is available on the Internet at <http://www2.state.hi.us/bidapps/showbids.cfm>) no later than 2:30 p.m., September 3, 2004. Proposals received after the time and date fixed for submission will not be considered.

Written notice of intent to propose is due in OPRPM by 4:30 p.m., August 13, 2004. Intention to bid via FAX (808) 956-2093 is acceptable.

Vendors located outside the Island of Oahu, Hawai'i, USA, may request an official copy of the RFP to be sent via U.S. Postal Service by providing the vendor's name, address, contact person and telephone number. If express shipment is desired, requests must be submitted in writing with an account number, BILLABLE TO THE RECEIVER, and an authorized signature. Requests may be transmitted via facsimile, (808) 956-2093. Direct all questions to Gwen Won, (808) 956-8687.

David McClain

Acting President, University of Hawai'i

Advertised: Honolulu Star-Bulletin

Issue of: August 2, 2004

NOTICE TO OFFERORS

OPRPM FORM 115

BUSINESS CLASSIFICATION CERTIFICATION STATEMENT

(See Official Document)

SECTION 1 ADMINISTRATIVE OVERVIEW

1.1 INTRODUCTION

This is a Request for Proposals (RFP) issued by the University of Hawai'i to solicit proposals from Offerors who wish to be considered to furnish services to assist the University of Hawai'i in obtaining federal funds.

1.2 AUTHORITY

This Request for Proposals (RFP) is issued under the provisions of the Hawai'i Revised Statutes, Chapters 304-4(d). All prospective Contractors are charged with presumptive knowledge of all requirements of the cited authorities. Submission of a valid executed proposal by any prospective Contractor shall constitute admission of such knowledge on the part of such prospective Contractor.

1.3 RFP ORGANIZATION

This RFP is organized into the following sections:

Section 1, Administrative Overview -- Provides offerors with general information on the objectives of this RFP, procurement schedule, and procurement overview.

Section 2, Scope of Work -- Provides offerors with a general description of the tasks to be performed, delineates University and Contractor's responsibilities, and defines deliverables.

Section 3, Proposal Requirements -- Describes the required format and content for the offeror's proposal.

Section 4, Criteria to Evaluate Proposals -- Describes how proposals will be evaluated by the University of Hawai'i.

Section 5, Special Provisions -- Provides offerors the terms and conditions under which the work will be performed.

1.4 SCHEDULE OF KEY DATES

The schedule of key dates set forth herein represents the University's best estimate of the schedule that will be followed. Any of the dates listed below may be changed at any time at the sole discretion of the Director, Office of Procurement and Real Property Management:

RFP Advertised and Issued	<u>August 2, 2004</u>
Letter of Intent to Submit Proposal Due	<u>August 13, 2004</u>
Closing Date for Submission of Questions	<u>August 13, 2004</u>
University Response to Offeror's Questions	<u>August 27, 2004</u>
Closing Date for Receipt of Proposals	<u>September 3, 2004</u>
Proposal Review Period	<u>September 7 - 24, 2004</u>
Contractor Selection*	<u>September 27, 2004</u>
Contract Start Date*	<u>January 1, 2005</u>

*Contractor selection and contract start date are subject to approval by the University of Hawai'i Board of Regents

1.5 LETTER OF INTENT

A non-binding letter of intent to submit a proposal in response to the RFP must be received by the issuing officer by 4:30 p.m., on August 13, 2004. An offeror not submitting a letter of intent shall not be precluded from submitting a proposal. However, only those offerors who have submitted a letter of intent will receive examples of recent requests which were funded by special Congressional appropriations as well as UH Federal Funding requests, official University responses to offerors' questions, and other communication as required. Faxed letters will be accepted. A form for this purpose is available at Appendix F.

1.6 SUBMISSION OF QUESTIONS

Offerors may submit questions in writing to the issuing officer. The deadline for submission of written questions is 4:30 p.m., H.S.T. on August 13, 2004.

Offerors may call the Technical Representative, Mr. David Morihara at (808) 956-5090 for questions regarding the content of the work specifications.

1.7 SUBMISSION OF PROPOSALS

Offerors shall submit an ORIGINAL plus FIVE (5) copies of the proposal. Proposals shall be received by the Office of Procurement and Real Property Management, University of Hawai'i, no later than 2:30 p.m., H.S.T. on September 3, 2004.

Proposals shall be mailed or delivered to:

Office of Procurement and Real Property Management
University of Hawai'i
1400 Lower Campus Road, Room 15
Honolulu, Hawai'i 96822

Any proposal received after this date and time shall be rejected.

The outside cover of the package containing the proposal shall be marked:

Office of Procurement and Real Property Management
University of Hawai'i
1400 Lower Campus Road, Room 15
Honolulu, Hawai'i 96822
RFP No. 05 –012, Furnish Services to Assist the University of Hawai'i in
Obtaining Federal Funds, University of Hawai'i, Honolulu, Hawai'i
(Name of Offeror)

1.8 COSTS FOR PROPOSAL PREPARATION

Any costs incurred by Offerors in preparing or submitting a proposal shall be the offeror's sole responsibility.

1.9 DISQUALIFICATION OF PROPOSALS

The University reserves the right to consider as acceptable only those proposals submitted in accordance with all requirements set forth in this RFP and which demonstrate an understanding of the scope of the work. Any proposal offering any other set of terms and conditions contradictory to those included in this RFP may be disqualified without further notice.

An offeror shall be disqualified and the proposal automatically rejected for any one or more of the following reasons:

The proposal shows any noncompliance with applicable law.

The proposal is conditional, incomplete, or irregular in such a way as to make the proposal indefinite or ambiguous as to its meaning.

The proposal has any provision reserving the right to accept or reject award, or to enter into a contract pursuant to an award, or provisions contrary to those required in the solicitation.

The offeror is debarred or suspended.

1.10 PROCUREMENT OFFICER

This RFP is issued by the Office of Procurement and Real Property Management, University of Hawai'i. The Procurement Officer responsible for overseeing the contract is Mr. Duff Zwald, Director of the Office of Procurement and Real Property Management.

1.11 TECHNICAL REPRESENTATIVE OF THE PROCUREMENT OFFICER (TRPO)

The individual listed below is the Technical Representative of the Procurement Officer (TRPO):

Mr. David Morihara
Director, Government Relations
Telephone: (808) 956-5090
Facsimile: (808) 956-9701

Office of the Vice President for External Affairs
and University Relations
University of Hawai'i
2444 Dole Street, Bachman 109J
Honolulu, Hawai'i 96822

1.12 ISSUING OFFICER

The individual listed below is the issuing officer and the official contact for all communication regarding this RFP:

Gwen Won, Associate Director
Office of Procurement and Real Property Management
University of Hawai'i
1400 Lower Campus Road, Room 15
Honolulu, Hawai'i 96822
Telephone: (808) 956-8687
Facsimile: (808) 956-2093

1.13 CHANGES TO CONTRACTOR'S FEE

It is recognized that audit disallowances and other changes may require adjustments in the compensation due to the Contractor. In the event that future actions would either disallow or minimize the payments already made to the Contractor, the Contractor shall assist the University in defending the correctness of the claim for reimbursement. If the disallowance or adjustment is upheld, then the Contractor will participate in the payback to the extent the amount of the disallowance or adjustment contributed to the total fee received by the Contractor. Payment to the University shall be made within THIRTY (30) calendar days from which official notice is received by the Contractor from the University.

1.14 RFP AMENDMENTS

The University reserves the right to amend the RFP any time prior to the closing date for best and final offers.

1.15 AWARD ON INITIAL PROPOSALS

The University may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the offeror's best terms.

1.16 AVAILABILITY OF FUNDS

Offerors are advised that the award of this contract is contingent upon availability of funds. If funds are not available, the University reserves the right not to make award of this contract.

1.17 NOTICE TO PROCEED

The University shall not be responsible for work done, even in good faith, prior to the University's Notice to Proceed unless specific provisions are made in the contract.

1.18 RFP SUBMITTALS BECOME PROPERTY OF THE UNIVERSITY

All proposals and other material submitted shall become the property of the University and may be returned only at the University's option.

SECTION 2 SCOPE OF WORK

2.1 OVERVIEW OF THE UNIVERSITY OF HAWAI'I

The University of Hawai'i (hereinafter referred to as the University), one of the largest employers in the State of Hawai'i, touches the lives of thousands of Hawai'i residents and is increasingly the alma mater of individuals worldwide. The 10-campus University of Hawai'i system is a vital public institution of strong international reputation with unparalleled learning, student experiences, and research activities. The University provides a comprehensive range of educational offerings from vocational training through doctoral programs for an average enrollment of 50,000 students and attracts more than \$300 million per annum in externally funded research and training contracts and grants.

Founded in 1907, the University of Hawai'i system is now composed of THREE (3) university campuses; SEVEN (7) community college campuses; THREE (3) University Centers, and other research extension and educational facilities distributed across SIX (6) islands throughout the 50th state. In addition to the major research campus, the University of Hawai'i at Mānoa, the University system includes the 3,000 students of the University of Hawai'i at Hilo on the island of Hawai'i, and the smaller University of Hawai'i – West O'ahu on the Leeward side of O'ahu. The University of Hawai'i Community College system has four campuses on O'ahu and one each on Maui, Kauai, and Hawai'i, making liberal arts and vocational college classes accessible and affordable, easing the transition from high school to college for many students. The education centers are located in the more remote areas of the state and support the rural communities via distance education.

Ideally located in the heart of the Pacific, the University of Hawai'i is the location of choice for business experts and scientists with ties to both Asia and the mainland United States. Experts from both sides of the Pacific find a comfortable home base in Hawai'i's multi-ethnic community.

The University of Hawai'i enrolls more than 2,000 international students from more than 80 countries. Eighty-six percent of international students are from the Asia-Pacific countries. The University maintains approximately 130 agreements with educational institutions in 28 countries, facilitating exchange opportunities for students and faculty.

The University Alumni Association serves more than 150,000 alumni in 50 states and 85 foreign countries.

2.2 BACKGROUND INFORMATION

The purpose of this contract is to maximize receipt of Federal funding for selected programs and projects of the University of Hawai'i. The University intends to acquire the services of a Contractor to immediately seek and implement requests for Federal funds for current and future expenditure periods. The selected Contractor shall develop recommendations and assist in implementing required actions to document and process requests for Federal funds.

The scope of work for this contract encompasses the University of Hawai'i System and includes research, education and advisory services for the State of Hawai'i and Nation. A wide diversity of disciplines will be represented from the sciences, social sciences, engineering, arts and humanities. Examples of recent requests which were funded by special Congressional appropriations as well as UH Federal Funding requests for FY 2002, 2003 and 2004 will be included in the resource materials to be provided to those offerors who submit letters of intent to submit a proposal in accordance with Subsection 1.5 LETTER OF INTENT. Support which is sought for programs and projects may take the form of support for operations, purchase of equipment, renovations of existing facilities and/or new construction. Specific programs and projects for which funding support will be sought will be identified during the time the contract is in effect. In addition, other projects which are in need of Federal funding support will be identified after the initiation of the contract.

2.3 STATEMENT OF WORK/SERVICES TO BE PROVIDED

2.3.1 REQUIRED SERVICES:

A. ACCOUNT MANAGEMENT

1. Contractor shall assign one qualified representative to serve as the lead contact for the University. Contractor's representative shall be familiar with the University of Hawai'i. The Contractor's representative shall be responsible for all follow through and for assuring responses to University concerns. Contractor's representative may be asked to assist the University in setting a strategic direction for the program.
2. Contractor shall develop a team with a diverse background capable of serving the various needs of the University.

B. COORDINATION

Contractor shall coordinate the efforts of the University of Hawai'i:

1. Provide the necessary support and work with the various representatives of the University.
2. Establish and coordinate communications links with relevant congressional and administrative offices
3. Assist in the development of the University of Hawai'i's federal priorities.

C. RESEARCH

Contractor shall provide research based on inquiries of the University of Hawai'i to include:

1. Provide tracking of congressional resolutions.
2. Provide information on congressional timetables, deadlines and status.
3. Providing general information on inquiries of the University of Hawai'i.

D. PROJECT MANAGEMENT

The Contractor shall prepare and maintain a Detailed Work Plan (DWP) that includes all applicable tasks identified in this section of the RFP for each project.

1. The DWP will present each task in sufficient detail and clarity as to enable the University to be satisfied that work is to be performed in a logical sequence, in a timely manner, and with efficient use of resources.
2. The DWP shall include a detailed timeline for major tasks and standard response times for common inquiries.

E. RESOURCE ASSESSMENT

The Contractor shall explore opportunities to obtain Federal funds and shall develop a Resource Assessment Report for each project undertaken.

Each Resource Assessment shall include the identification and description of each project undertaken, including, but not limited to:

1. Potential source(s) of funding
2. Expenditure time period(s) during which funds can be solicited, etc.
3. Identification of the University programs involved
4. Identification of State agencies involved, if any
5. Identification of Federal agencies involved
6. Expected time to completion of project

F. REQUIRMENT ANALYSIS

The Contractor shall develop a Requirements Analysis Report for each project to include, when applicable:

1. Identification of major barriers to realizing Federal matching funds, including amendments to State statute, administrative rules, program plans and policies, and an estimated schedule for implementation of changes.
2. Identification of offeror's resources required to implement the project in part or in whole, including an estimated schedule for implementation.
3. Identification of University accomplishments relating to obtaining Federal matching funds relative to each project.
4. Determination of University costs associated with the collection of Federal funds.
5. Determination of associated State costs associated with the collection of Federal matching funds.
6. Identification of possible interfaces with existing University resources, including University personnel, facilities, training, etc.
7. Assessment of fiscal and programmatic impediments which may adversely affect the likelihood of successfully obtaining Federal funds as planned.

8. Provide monthly status reports updating the Requirements Analysis Report.

G. IMPLEMENTATION PLANNING

The implementation planning task consists of those activities required to detail the activities, tasks, schedule, and responsibilities required for the funding of the project:

1. Develop the Implementation Plan deliverable that clearly and concisely describes the activities, tasks, schedule, resources, and procedures required for funding the project.
2. Provide monthly status report on Implementation Planning Task.

H. OPERATIONS

The Contractor shall implement the actual operations as described in the Implementation Plan approved by the University. The Contractor shall be responsible for the following:

1. Gathering pertinent data
2. Records management
3. Reporting requirements
4. Communicating with University staff where interfaces have been identified
5. Drafting and preparing prospectuses
6. Drafting appropriate legislative language
7. Submission of monthly Management Report which summarizes activities in the Operations Phase
8. For prospective projects, develop documentation for recommended changes to policies and procedures
9. Submission of an Annual Project Report
10. Maintain current status information on each project in progress

11. Provide the University with an annual updated Federal funds “forecast” report no later than THIRTY (30) days following the beginning of the new State fiscal year which shall include an explicit reference to the expectations for Federal matching funds for the new State fiscal year

I. OPERATIONS TURNOVER

Contractor shall be responsible for:

1. Within THIRTY (30) days after receipt of notification of intent by the University or its designated agent in assuming the partial or complete turnover of operations, provide a turnover plan that shall include the proposed approach, including identification of University personnel, facilities, data processing requirements, etc., and the tasks and schedule for turnover
2. Provide all documentation, including but not limited to actual source documents, if applicable
3. Provide post-turnover services to ensure that problems that were caused by a lack of support at turnover are corrected
4. Submit a final Project Report within FORTY-FIVE (45) days after the end of the contract term
5. All costs pertaining to these responsibilities shall be included in the Contractor’s fee, described in Appendix D, Fee Structure

H. TRANSPORTATION/TRAVEL

1. Significant travel by the Contractor may be required to provide the services. Any such travel costs, including but not limited to, travel arrangements, transportation, meals and lodging, etc., will be the sole responsibility of the Contractor.

2.4 MINIMUM QUALIFICATIONS

- A. Contractor shall have experience and history in successfully representing Carnegie I research universities.
- B. The University requires that the Contractor maintain a facility in the Washington, D.C. area.

- C. Offerors shall have knowledge about Hawai'i and the Asia-Pacific Region.

2.5 DESIRABLE QUALIFICATIONS

- A. Contractor shall have experience in working with the congressional delegation from Hawai'i.
- B. Contractor shall have experience in working on projects from Hawai'i or the University of Hawai'i.

2.6 UNIVERSITY CONTACT

Offerors shall provide the name(s) and telephone number(s) of the individual(s) who would be the primary contact for the University in the event that a contract is awarded.

SECTION 3 PROPOSAL REQUIREMENTS

3.1 INTRODUCTION

This section indicates the proposal requirements for this RFP which shall be submitted by the deadline set for submission of proposals. Fulfillment of all proposal requirements listed is mandatory for consideration of proposals.

The Proposal shall include the following subsections:

Proposal Letter

Recent Experience

Project Narrative

Fee Structure

References

3.2 PROPOSAL LETTER (Appendix A)

The Proposal Letter shown in Appendix A shall be signed by an individual authorized to legally bind the offeror, dated, and be affixed with the corporate seal (if corporate seal is available). If said individual is not the corporate president, evidence shall be submitted showing the individual's authority to bind the corporation. The fully executed proposal letter shall be submitted along with the proposal.

3.3 OFFEROR'S EXPERIENCE (Appendix B)

Offeror shall complete and submit APPENDIX B, Recent (Within Last THREE [3] Years) Experience.

3.4 PROJECT NARRATIVE (Appendix C)

- A. A description of the company, including number of employees, number of years in business, a list of key company principals, and types of services provided.
- B. Describe in detail in Appendix C how offeror's company will be able to provide the services detailed in Section 2, SCOPE OF WORK.

3.5 FEE STRUCTURE (APPENDIX D)

Offerors shall provide in Appendix D all costs associated with providing the services as detailed in Section 2, SCOPE OF WORK.

3.6 REFERENCES (APPENDIX E)

Offerors shall provide a minimum of at least THREE (3) references that can attest to the reliability of the Offeror's service and personnel. Furnish the names of companies, addresses, phone numbers, and contact persons. The University reserves the right to contact the references for additional information.

3.7 OFFEROR'S PROPOSAL SUBMITTALS CHECK LIST

The following checklist is provided to assist the Offeror in submitting the appropriate documents with their proposals:

- 1) _____ Business Classification Certification Statement
- 2) _____ Appendix A, Proposal Letter (if applicable, shall include a corporate seal and an Evidence of Authority if the individual signing the proposal on behalf of the company is not the corporate president)
- 3) _____ Appendix B, Offeror's Experience
- 4) _____ Appendix C, Project Narrative
- 5) _____ Appendix D, Fee Structure
- 6) _____ Appendix E, References
- 7) _____ Appendix F, Letter of Intent to Submit a Proposal
- 8) _____ State of Hawai'i Department of Taxation **and** Internal Revenue Service certified Tax Clearance Certificate or OPRPM Form 128, CERTIFICATION FOR TAX CLEARANCE.

SECTION 4 CRITERIA TO EVALUATE PROPOSALS

The evaluation of proposals received in response to the RFP will be conducted comprehensively, fairly, and impartially. A contract will be awarded to the responsive, responsible Offeror whose proposal is determined in writing to be the most advantageous to the University taking into consideration the evaluation factors set forth in this RFP.

A committee will be selected to evaluate and score each proposal submitted based on the following set forth herein.

4.1 EVALUATION PROCESS

An evaluation of all proposals received shall be conducted based on the criteria set forth in Section 4, Criteria to Evaluate Proposals. Each individual on the evaluation committee will provide scores for each Offeror not to exceed the maximum amount of points allowed, TWO HUNDRED (200), for the evaluation. The scores for all of the individuals on the evaluation committee will be totaled and averaged for each Offeror.

Award of the contract if awarded, shall be made to the Offeror receiving the highest average score for the final evaluation.

4.2 EVALUATION OF MANDATORY REQUIREMENTS (PASS/NO PASS)

The evaluation of the mandatory requirements shall be based upon a “pass/no pass” basis. No points shall be assigned for these requirements. The purpose of this phase is to determine whether an offeror’s proposal is sufficiently responsive to the RFP to permit a complete evaluation. Each proposal will be reviewed for responsiveness. Failure to meet the minimum mandatory requirements (“no pass”) will be grounds for deeming the proposal nonresponsive to the RFP and rejection of the proposal. Only those proposals meeting the mandatory requirements (“pass”) will be considered for evaluation.

A. Mandatory Requirements for the Proposal

- Proposal Letter
- Recent Experience
- Project Narrative
- Fee Structure
- References

B. Minimum Qualifications Pass/ No Pass

1. Experience and history of the Offeror in successfully representing Carnegie I research universities.
2. Offeror maintains a facility in the Washington, D.C. area.
3. Offeror has knowledge about Hawaii and the Asia-Pacific Region.

4.3 EVALUATION Points: 200 points total

A. Company Background and Experience – 40 Points

The University will evaluate the experience, performance, corporate resources, and corporate qualifications of the offeror and all Subcontractors (if any). References will be verified and findings incorporated into the evaluation.

1. Financial Stability

The University will evaluate the financial condition of the offeror to determine whether, in its opinion, the offeror has sufficient financial resources to meet all the terms of the contract.

Has the offeror submitted audited financial statements (if applicable)?

Does the offeror possess the ability to generate positive cash flows from other ongoing operations and/or sufficient working capital to cover the lapse between the time the Contractor incurs costs and the time the University pays the Contractor's fees and to get through a temporary crisis resulting from this contract that would have a significant impact upon the Contractor's operations and interfere with its ability to complete contractual obligations?

2. Company Performance

As part of the evaluation of the offeror's company experience, the committee will evaluate relevant performance references.

Has the offeror been responsive to previous clients?

Is the offeror timely in meeting its deliverables?

Does the offeror adhere to contract requirements of previous clients?

Availability and accessibility of resources to previous clients?

3. Company Experience

The committee will evaluate the offeror's and all Subcontractors' (if any) experience in acting in a Contractor capacity and in Federally funded projects. Specifically, proposals will be evaluated against the following criteria:

Experience in completing or supporting Federally funded projects in the last FIVE (5) years.

Experience in providing consultant services to educational agencies and institutions and in providing these services through a structure of collaboration across multiple agencies.

Experience in drafting and preparing prospectuses for proposed projects.

Experience in developing plans and legislative strategies for projects.

Experience in drafting appropriate legislative language.

B. Project Organization and Staffing - 40 Points

The evaluation of project organization and staffing will involve detailed criteria evaluating the offeror's overall staffing approach to the project and tasks, qualifications of key personnel, and the past performance of the company and the individuals. The proposed project organization and staffing resources will also be evaluated to assess the offeror's capability to complete all the deliverables within the projected timeframe. References for proposed individuals will be checked and included in the evaluation of this section. Reference checking is not limited to only those references supplied by the offeror. Requirements for organization, staffing, and personal experience of positions shall include:

1. Organization Charts

Approach and rationale for the structure, functions, and staffing of the proposed organization for the overall project and project tasks.

Approach and rationale for the number and types of personnel proposed.

Approach and rationale for use of Subcontractors.

Work location of personnel.

2. Key Personnel Resumes

The evaluation committee will evaluate the key management personnel and other key personnel proposed for the project based on the experiences listed under the individual resumes.

Experience with completing or supporting Federally funded projects.

Experience with offeror and/or Subcontractor.

Experience in providing consultant services to educational agencies and institutions.

Experience in drafting and preparing prospectuses for proposed projects.

Experience in developing plans and legislative strategies for projects.

Experience in drafting appropriate legislative language.

Other management experience.

Relevant education and training.

C. Quality of the Proposal - 10 points

1. Thoroughness and comprehensiveness of the proposal – meets service requirements.

D. Understanding of the Project - 10 Points

1. Has offeror demonstrated a thorough understanding of the purpose and scope of the work?

2. Has the offeror demonstrated that it understands the deliverables the University expects it to provide?
3. Has the offeror demonstrated that it understands the University's time schedule and can meet it?

E. Technical Approach to Scope of Work - 60 Points

Evaluation criteria for this section will assess the offeror's approach to the Federally funded projects.

1. Coordination

Offeror's Coordination methodology.

Proposal to coordinate with various representatives of the University.

Proposal to establish and coordinate communications links with relevant congressional and administrative offices.

2. Research

Offeror's research methodology.

Proposal to track and research congressional resolutions.

3. Project management

This part of the evaluation assesses the offeror's approach to project management and project control methods and tools to successfully complete projects on schedule. This area of evaluation also includes an assessment of the preliminary detailed work plan, including an appraisal of the logic of the work plan, clarity of work assignments and organizational roles, responsibilities, and authorities, the interfacing with University staff, and an evaluation of the realism of the tasks and schedules.

Project control approach (including demonstrated previous use of control methods and tools to successfully complete projects on schedule; plan for reporting to the University).

Approach to interfaces with the University.

Approach to ensuring quality and timeliness of deliverables, completion of tasks and fulfillment of responsibilities.

Ensuring security and confidentiality.

The DWP must include Assessment and Planning, Operations, and Operations Turnover.

The schedule for all deliverables must provide reasonable review time (at least TEN [10] workdays) for the University.

4. Resource Assessment

Offeror's resource assessment methodology.

5. Requirement Analysis

Offeror's requirements analysis methodology.

For each program initiative, offeror demonstrates a knowledge of requirements for establishing client eligibility.

6. Implementation Planning

Offeror's implementation planning approach.

For each program initiative, offeror demonstrates a knowledge of legislative approaches in obtaining Federal matching funds.

7. Operations

Approach to contract responsibilities and tasks Operations, and all associated tasks and responsibilities.

8. Operations Turnover

Technical approach to the overall Operations Turnover Phase, including the approach to each associated task and responsibility area.

Offeror's approach to planning for the turnover of functions to the University or its designee.

Offeror's approach to the actual turnover activities.

Offeror's approach to support in the post-turnover period.

F. Desirable Qualifications - 20 points

Contractor shall have experience in working with the congressional delegation from Hawai'i.

Contractor shall have experience in working on projects from Hawai'i or the University of Hawai'i.

G. Total Compensation Due to the Contractor (Costs to Contract) - 20 Points

The proposal with the lowest cost factor will receive the highest available rating allocated to cost. Each proposal that has a higher cost factor than the lowest will have a lower rating for cost.

Proposal costs shall be evaluated by using the "Total 'not to exceed maximum payment limit.'"

4.5 AWARD EVALUATION - Maximum Possible Points: 200

4.6 RECOMMENDATION FOR AWARD

The Evaluation Committee will prepare a report summarizing findings and rankings and will make the final recommendation for selection of the Contractor.

SECTION 5 SPECIAL PROVISIONS

5.1 SCOPE

The Furnishing of Services to Assist the University of Hawai'i in Obtaining Federal Matching Funds shall be in accordance with the terms and conditions of RFP No. 05-012 and the General Provisions dated March, 2003, included by reference. Copies of the General Provisions are available at the Office of Procurement and Real Property Management, University of Hawai'i, 1400 Lower Campus Road, Room 15, Honolulu, Hawai'i 96822 or the General Provisions may be viewed at: <http://www2.state.hi.us/bidfiles/uhgpgs.pdf>

5.2 REFERENCES

The University reserves the right to contact the references named in Appendix E, REFERENCES, and to reject a proposal submitted by any offeror whose performance on other projects has been unsatisfactory.

5.3 OPENING OF PROPOSALS

Proposals will be opened at the date and time specified in Subsection 1.4, SCHEDULE OF KEY DATES, or as amended, at the proposal submittal office. The proposal opening will not be open to the public. Proposals may be available for public inspection upon notice of award and shall be available for public inspection after the contract is signed by all parties.

5.4 CONTRACT INVALIDATION

If any provision of this contract is found to be invalid, such invalidation will not be construed to invalidate the entire contract.

5.5 TERM OF CONTRACT

The initial term of the contract shall be for a period of ONE (1) year commencing on the date designated in the Notice to Proceed. Thereafter, the contract may be renewable from year to year for FOUR (4) additional years (total of FIVE [5] years), upon mutual agreement of the parties in writing, NINETY (90) days' prior to the annual renewal date, contingent upon the availability of funds. In addition, the University may terminate this contract at any time, upon THIRTY (30) days' prior written notice.

5.6 FEES

All fees and costs quoted herein for the services specified in Section 2, SCOPE OF WORK, shall remain firm for the entire contract term.

5.7 PAYMENT

The Contractor shall be remunerated monthly upon submission of properly executed original invoices and ONE (1) copy, indicating the contract number, to the Office of the Vice President for External Affairs and University Relations, 2444 Dole Street, Bachman 109J, Honolulu, Hawai'i 96822, no later than THIRTY (30) calendar days following submission of invoice and the acceptance of services.

5.8 TAX CLEARANCE FOR CONTRACTS

Bidders shall submit with their bid packages, original or certified tax clearances from the State of Hawai'i Department of Taxation and the Internal Revenue Service, in accordance with General Provision 2.23, Tax Clearance for Contracts.

5.9 TAX CLEARANCE FOR FINAL PAYMENT

Before final payment for the settlement of the contract can be made, Contractor shall submit an original or certified tax clearance from the State of Hawai'i Department of Taxation and the Internal Revenue Service, in accordance with General Provision 7.2, Tax Clearance for Final Payment.

APPENDIX A

PROPOSAL LETTER UNIVERSITY OF HAWAI'I

We propose to furnish and deliver any and all of the deliverables and services named in the Request for Proposals (RFP) to Furnish Services to Assist the University of Hawai'i in Obtaining Federal Funds, RFP No. 05-012.

It is understood that this proposal constitutes an offer.

It is understood and agreed that we have read the University of Hawai'i's specifications described in the RFP and that this proposal is made in accordance with the provisions of such specifications. By signing this proposal, we guarantee and certify that all items included in this proposal meet or exceed any and all such specifications.

We agree, if awarded the contract, to deliver goods or services which meet or exceed the specifications.

Respectfully submitted,

Legal Name of Offeror

Date

Authorized Signature (original) (Typed Name)

Title

Street Address

Telephone No.

City, State, Zip Code

Fax No.

Social Security OR Federal Tax Payer ID No.

Hawai'i General Excise Tax License No.

Remittance Address (if different from street address)

City, State, Zip Code

Location of Offeror's Plant

Offeror is: ☐ Individual ☐ Partnership ☐ Corporation* ☐ Joint Venture

State of Incorporation: ☐ Hawai'i ☐ Other:

Is Corporate Seal Available In Hawai'i: ☐ Yes** ☐ No

* Attach to this page evidence of authority of the above officer to submit an offer on behalf of the corporation, giving also, the names and addresses of the other officers.

** If yes, affix corporate seal.

APPENDIX B

RECENT (WITHIN LAST THREE [3] YEARS) EXPERIENCE

Provide a minimum of THREE (3) firms.

<u>Name & Address of Firm</u>	<u>Contact Person</u>	<u>Telephone Number</u>	<u>Date of Services</u>	<u>Description of Services</u>
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NOTE: Offerors may use this form or a separate sheet in another format, provided all information requested is supplied.

APPENDIX C PROJECT NARRATIVE

A. EXECUTIVE SUMMARY

Offerors shall provide an Executive Summary that shall clearly and concisely summarize and highlight the contents of the offeror's proposal in such a way as to provide the University with an understanding of the entire proposal.

B. UNIVERSITY RELATIONS/ACCOUNT MANAGEMENT

1. Company Background

- a. Principal business of the offeror and types of services provided.
- b. Date company was established.
- c. Describe any pending litigation against the offeror. State details and provide an opinion of legal counsel that the pending litigation will not impair the offeror's ability to perform the services required under this RFP.

2. Financial Stability

- a. The offeror shall provide information on the company resources by presenting sufficient evidence of financial stability, which may include: annual revenue over the last FIVE (5) years, number of employees over the last FIVE (5) years, years in business, evidence of business insurance for professional liability, and financial references (which may include audited financial statements, unaudited financial statements, compiled financial statements, and references from banking relationships).

3. Company Performance

The offeror shall provide information that will demonstrate the following:

- a. Responsiveness to previous clients
- b. Timeliness of meeting deliverables
- c. Adherence to contract requirements of previous clients

- d. Availability and accessibility of resources to previous clients

4. Company Experience

The offeror shall describe in detail the offeror's experience in providing services similar to those required under this RFP, specifically:

- a. Experience in completing or supporting Federal fund projects in the last FIVE (5) years.
- b. Experience in providing consultant services to educational agencies and institutions and in providing these services through a structure of collaboration across multiple agencies.
- c. Experience in drafting and preparing prospectuses for proposed projects.
- d. Experience in establishing communication links between the University of Hawaii, the State of Hawai'i, Federal agencies and legislative bodies.
- e. Experience in developing plans and legislative strategies for projects.
- f. Experience in drafting appropriate legislative language.

5. Personnel: Project Organization and Staffing

- a. Describe the offeror's organization, its size and resources.
- b. Provide organization charts.
- c. Describe the proposed organizational structure for this project specifying the number of experienced personnel that will be assigned.
- d. Provide resumes for all key personnel.

B. COORDINATION

- 1. Describe in detail how offeror's company will coordinate the efforts of the University.

C. RESEARCH

- 1. Describe in detail how offeror's company will provide research services.

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D. PROJECT MANAGEMENT

1. Describe in detail a Detailed Work Plan (DWP).

E. RESOURCE ASSESSMENT

1. Describe in detail offeror's resource assessment methodology.

F. REQUIREMENT ANALYSIS

1. Describe in detail offeror's requirement analysis methodology.

G. IMPLEMENTATION PLANNING

1. Describe in detail offeror's implementation planning approach.

H. OPERATIONS

1. Describe in detail offeror's operations methodology.

I. OPERATIONS TURNOVER

1. Describe in detail offeror's operations turnover methodology.

APPENDIX D FEE STRUCTURE

Offerors shall provide all costs associated with providing the services to assist the University of Hawai'i in obtaining Federal funds including but not limited to:

- A. Project management.
- B. Researching and tracking congressional resolutions, timetables, deadlines and status.
- C. Costs or fees associated with subcontractors.
- D. Fees associated with assessment, analysis and planning.
- E. Costs or fees for operations or operations turnover.
- F. Fees associated with legal and fiscal services.
- G. Estimated Travel Expenses.
- H. Other costs not provided by items A through G above.

Offerors shall indicate what services are included in the monthly fee. Offerors shall provide a specific dollar amount limiting the total monthly compensation amount of the contract. This amount will represent the not to exceed maximum payment limit and shall include all costs including all applicable taxes associated with providing the services required under this RFP. The contract amount shall not exceed this amount.

APPENDIX E REFERENCES

Provide the name of company, address, contact name, and phone number for at least THREE (3) references.

**APPENDIX F
LETTER OF INTENT TO SUBMIT A PROPOSAL**

DATE _____

Office of Procurement and Real Property Management
University of Hawai'i
1400 Lower Campus Road, Room 15
Honolulu, Hawai'i 96822

To Whom It May Concern:

Subject: Notice of Intention to Submit a Proposal under RFP No. 05-012 to Furnish
Services to Assist the University of Hawai'i in Obtaining Federal Funds,
University of Hawai'i, Honolulu, Hawai'i

I intend to submit a proposal for the above-named RFP.

Name of Firm: _____

Address: _____

Telephone No.: _____

FAX No.: _____

Signed By: _____

Title: _____

CERTIFICATION FOR TAX CLEARANCE

(See Official Document)